



Celebrating 50 Years of  
Promoting Financial Women's Success

FWA/SF

News

The Financial Women's Association of San Francisco | [www.fwasf.org](http://www.fwasf.org)

## President's Message



Dear FWA members and supporters,

This autumn we are certainly enjoying a beautiful season in the Bay Area. Unfortunately, the turmoil in the economy and, specifically, in the finance sector has hit many of you very hard. Over the next few months, we will help you weather the storm with programs designed to enhance your understanding of the current economic situation and the related changes and corrections that may happen in both the near and long term.

The upcoming related programs include "A Women-Centered Perspective on Economics" on October 21 at Mills College, and "Changing Careers" with Heidi Roizen, on October 28th. The annual career networking event for members and sponsors will be held on October 29th at Le Meridien hotel. The presentation by SKIRTWORKS® founder, Michelle Alberda will focus on how to maximize your network and networking skills. This event is usually sold out, so please register early.

Once again, our Financial Woman of the Year event was a not-to-be-missed celebration of a woman at the pinnacle of her career. If you were unable to attend, the videos of Leslie Tang Schilling and the scholarship recipients can be viewed on our [website](#). Special thanks to all of you who attended and sponsored this year!

Thanks also go to our Financial Woman of the Year co-chairs, Julie Merrill and Teri Noble-Grumm, and our Sponsorship co-chairs, Kathy Wheadon and Donna Davidson for ensuring that the program was a rousing success.

Many of you have joined the [FWA LinkedIn Group](#) for members, and I encourage you all to do so. This is an excellent means to navigate the challenging times that we currently face. It is also a great place to give feedback to the FWA on how we can better serve your career needs.

Enjoy this fall edition of the FWA newsletter, and have a happy and relaxing Thanksgiving holiday. In our next newsletter, we will give you a preview of programs to come in 2009.

All the best,

*Mary Corroon*

FWA President

A quarterly publication for  
the members and friends  
of the Financial Women's  
Association of San Francisco.

**Fall 2008**

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## Financial Woman of the Year Event Honors Leslie Tang Schilling



**The FWA's 2008 Financial Woman of the Year Event honoring Leslie Tang Schilling** was a sold out, inspirational event. Each year the event recognizes and applauds the role women play in the field of finance in the Bay Area by:

- honoring a stellar senior executive in finance
- recognizing our wonderful scholarship recipients
- providing a terrific networking opportunity for hundreds in the financial community

Mary Corroon, President of the FWA of San Francisco, opened the event by reading a stirring letter from Senator Diane Feinstein recognizing Leslie for her accomplishments and the FWA for its contributions to the Bay Area community. Mary shared how the organization Facilitates networking, celebrates and sets up Wins and provides Access to mentoring throughout women's careers. She also recognized the critical support of all the sponsors and the many past FWA Presidents and Financial Women of the Year honorees at the luncheon.

All of the 2008 scholarship recipients were in attendance, most of them back in the swing of classes and excitedly sharing their experiences at

the VIP Reception tables where they were seated. What a treat to hear their fresh perspectives and magnificent plans for the future! The video of the recipients was moving, hearing in their own words what the scholarship and FWA mean to them and gave us a true sense of what is important to them. Additionally, several of 2007's recipients also attended – it was wonderful to hear their stories as they have graduated and are launching their careers.

Leslie Tang Schilling eloquently communicated her heartfelt dedication to education. She demonstrates this through her involvement with MIT, UC Berkeley, Trinity School and the UC Board of Regents; as well as supporting individual scholarships efforts in the US and China. This solidly shows her belief that education is a critical foundation to success that no one can take away from an individual once they attain it. Leslie believes that with education, hard work and dedication, we can all go out and make our dreams happen.

Many thanks to those that made the luncheon a rousing good time and success for everyone, including Leslie Tang Schilling, our FWA volunteers, and our partners whose dedication to details and execution were critical.

**Thank you to all!**

### THIS EVENT WOULD NOT HAVE BEEN POSSIBLE WITHOUT THE GENEROUS SUPPORT OF OUR SPONSORS:

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## The Financial Women's Association of San Francisco awards \$100,000 annually in educational scholarships

**FWA scholarships** encourage leadership and provide opportunity for San Francisco Bay Area women in the field of finance and/or the Financial Services Industry. Since 1995, the Fund has awarded over \$1,350,000 in scholarship grants to more than 160 Bay Area women.

Affiliation with the Financial Women's Association provides the opportunity to meet potential mentors and network with successful finance professionals while attending both learning and socially oriented functions.

In 2008, we are awarding 11 scholarships totaling \$100,000. Undergraduates receive \$5,000 each and graduate students receive \$10,000 each.

In addition to the financial award, scholarship recipients

- Are honored at an FWA luncheon in June
- Are invited to the Financial Woman of the Year luncheon in September
- Receive a paid Associate-level FWA membership
- Are eligible for our mentoring program

### Funding

The scholarships are funded by events held by FWA and through sponsors and individual donations.

### Eligibility and Requirements

**Undergraduate scholarships** are awarded to women who will be juniors or seniors in the Fall semester of the current year.

**Graduate scholarships** are awarded to students who will be enrolled during the upcoming Fall semester. This includes current students beginning their second year or future students who have been accepted into a graduate business program for the Fall semester.

Potential recipients that meet all of the following criteria are eligible to apply:

- Be enrolled during the fall semester at an accredited Bay Area college or university.

- Be enrolled either at:
  - i) The main physical campus of a Bay Area college or university; or
  - ii) If not attending the main campus of your school, be enrolled and attending a school satellite campus located within 1 of the 9 Bay Area campuses and taking at least eighty percent (80%) of classes at a satellite campus.
- Follow a course of study to attain a degree and pursue a career in finance or in the financial services industry.
- Maintain a minimum GPA of 3.4 or equivalent.



2008 Scholarship Recipients

Recipients are asked to attend a luncheon in their honor in June of the current year and The Financial Woman of the Year luncheon in September of the same year.

### Selection Criteria

Emphasis will be placed on the candidate's alignment to the FWA criteria, demonstrated leadership skills, academic honors and communication skills. Financial need and community involvement are also considered.

**Applications for 2009 will be accepted beginning in January 2009.**

**The FWA sincerely appreciates the efforts of members who participated in the 2008 scholarship interview process!**

### Career Opportunities

Looking for the next step in your career?  
Looking for the right person to fill an important position?

**Check out FWA's Career Opportunities and Career Corner to find a job or to post one.**

FWA of San Francisco is a targeted audience for employers seeking experienced professionals in the financial services industry, and our career site benefits both employers and candidates.

## 2008 Scholarship Winners

In 2008, the Financial Women's Association Scholarship fund awarded 11 scholarships totaling \$100,000. Two undergraduates received \$5,000 each and nine graduate students received \$10,000 each.



*Katherine Brennan*  
Stanford GSB

Ms Brennan is currently an Associate at Shamrock Capital Advisors in Los Angeles. She will study finance and entrepreneurship at Stanford GSB. Her goal is to become a partner in a private equity firm specializing in media and entertainment. She has a passion for entrepreneurship, inspired by her father who had a masonry business in Iowa, and looks forward to funding and nurturing small and medium sized entertainment/media companies. Recommenders note that she is quirky (in the best possible way) and has a wide range of interests, even studying improvisational acting while in LA, and continues to be involved as a mentor to business students at the University of Iowa.



*Betsabe Martinez Botaitis*  
Golden Gate University

Ms Martinez Botaitis' childhood dream was to be a successful business woman. In Mexico she confronted obstacles because the wealthy dominate education and job opportunities, and sexual harassment and discrimination make it difficult for women to rise out of low level jobs, particularly in finance and business. She came to the US to study finance after working for Citibank in Mexico and realizing that her courses at her Mexican university were insufficient to continue rising in the organization and to fully understand financial markets. She just received her MS in Finance from Golden Gate University and has enrolled in the GG University MBA program starting this fall and is interested in pursuing a career in risk management at a financial institution. During her studies she has been the Financial Manager & Treasurer of Carpet Contractors.



*Valeria Guirola*  
UC Berkeley MBA

Ms Guirola has been a member of FWA since 2006 and has held finance and analyst roles at two startups. She is a native of El Salvador and came to the United States to study at Menlo College where she worked with faculty and her advisors to form a "finance" concentration (previously unavailable). There, in addition to her academic success and significant community involvement, she was elected the first female Student President of a student body with a 4:1 male to female ratio. She wants to join a top consulting firm and eventually focus on micro-credit and small business training for women.



*Suzanne Permana*  
Mills College, MBA

Ms Permana was raised in Bandung, Indonesia and Oakland, California and is an MBA Candidate at Mills College. She has achieved academic honors throughout her college career while serving on the board of directors of two non-profit organizations, securing an internship at Lenders for Community Development, and many years of community activism on behalf of low income parents and urban teens. Her career goal is to become a financial analyst specializing in community development, incorporating finance and advocacy as a way of building self-sufficient communities and creating opportunities for at-risk low income individuals. Her references cite that her natural leadership skills "make her exceptional personal initiative and drive contagious."

### Newsletter Contributors:

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Want to contribute to the newsletter?  
Please submit future newsletter articles to:  
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## 2008 Scholarship Winners (continued from page 4)



*Cathy Tsai*  
Stanford GSB

Before enrolling at Stanford, Ms Tsai worked at Warner Bros Entertainment in Burbank, evaluating development opportunities and at Bain & Company, in management consulting. She intends to pursue a career in venture

capital working with innovative technology companies focused on media and entertainment. She is grateful for the guidance of multiple mentors at Bain and Warner Bros. and has worked to mentor more junior female colleagues. Her references cite the significant contributions she has made despite her relative youth and lack of an MBA, and praise her ability to work effectively with colleagues from every level of the organization, around the world: "You always want Cathy on your team."



*Jane Johnson*  
Cal State University,  
East Bay  
UNDERGRADUATE

Ms Johnson served 7 years with the US Navy before deciding to pursue a career in Accounting. She is pursuing a BA in Economics, with an Accounting option, at Cal State East Bay and expects to graduate in June 2009. Her goal is to become a

CPA. Recommendations from her superior officer in the Navy note her compassionate leadership style, motivation, and organizational skills.



*Megan Guy*  
Stanford GSB

Ms Guy is a founding member of the environmental strategy group at Goldman Sachs, where she previously worked as an investment banker in New York and Sydney, Australia. She intends to pursue environmental finance and apply market-based

approaches to challenges such as climate change and biodiversity conservation, particularly in ways that create new opportunities and growth in developing countries. She is a board member of The Seneca, a non-profit founded by women at Harvard to strengthen social and professional networks, resources, and opportunities for women.



*Kristina Hentschel, CPA*  
UC Berkeley -  
Columbia Executive MBA

Ms Hentschel is the Executive Director of GirlVentures, a community based non-profit with six full time and 25 part-time staff and an annual budget of \$725K. GirlVentures mission is to empower adolescent girls to develop and express their strengths

through outdoor adventure, creative arts, and group experiences. Her previous work includes controller and consulting roles at technology, entertainment, non-profit entities as well as four years at Deloitte & Touche. Her goal is leverage her accounting and finance expertise to build and lead a company that merge her interests in business, sports, and philanthropy to expand individual and corporate responsibility. And last, but not least, she is a professional triathlete and three time Ironman finisher.

## 2008 Scholarship Winners (continued from page 5)



*Desirae Ann Ubaldo*  
Cal State University, San Jose  
UNDERGRADUATE

Ms Ubaldo is pursuing a BA in Business Administration, with a concentration in Corporate Financial Management and a minor in Economics. She currently has a paid finance internship at Hitachi Data Systems in Santa

Clara and previously worked as a teller at Bank of America. She teaches Sunday school and is a leader in her church's youth ministry. Professors note her self confidence, maturity, and joy of learning.



*Ya Qing (Annie) Zhang*  
UC Berkeley, Masters of  
Financial Engineering

As an undergraduate at UC Berkeley Ms Zhang earned a double honors degrees in Economics and Molecular & Cell Biology. During her senior year she wrote an economics honors thesis with Dr George Akerlof, Nobel

Laureate whose recommendation led to a research associate job at the Federal Reserve in San Francisco. She started the UC Berkeley MFE program this Spring. Her long term goal is to utilize her financial knowledge and bilingual skills to minimize disruptions and smooth the transitions between Asia and the Western economy. She is an accomplished pianist and her reference from the Federal Reserve characterizes her as "a lively personality and a genuine pleasure to be around."



*Peiyuan Wang*  
UC Berkeley, Masters of  
Financial Engineering

Ms Wang's goal is to promote healthcare delivery through successful commercialization of discoveries in gene and nano therapy, bioinformatics, and proteomics. She is pursuing a Masters in Financial Engineering at UC Berkeley in order to better value biotechnology ventures, enabling com-

mmercialization of novel products that can maximize benefits for both health deliverers and patients. Her academic references observe that she is "a phenomenal student, the like of which we see here once in a decade, at most" (Masters, Mathematics) and "the best student I have encountered in over 20 years as a faculty member, which has included over a thousand medical, dental, and graduate students" (PhD, Physiology).

The fund is affiliated with the Financial Women's Association of San Francisco and is funded through the Financial Woman of the Year Event, supported by our generous sponsors. Funds received during 2007 funded our 2008 Scholarship program.

The FWA would like to extend appreciation to our top 2007 sponsors:

**VISIONARY**  
Wells Fargo  
Lenos Software

**BENEFACTORS**  
California Society of CPAs  
SF Business Times

**PACESETTERS**  
Bank of America  
Barclays Global Investors  
PricewaterhouseCoopers  
VISA

More information  
& online application:  
[www.fwasfscholarshipfund.org](http://www.fwasfscholarshipfund.org)

## The Mentor In You

**One of the missions of the Financial Women's Association of San Francisco (FWASF)** is to provide a forum for women in all facets of financial services to come together and share their experiences, ideas, successes, "bumps in the road" and concerns they have on navigating the course of their careers. This can happen in an unstructured way, with someone you meet at a luncheon or a networking event. The Mentorship Committee, however, is looking at more structured opportunities for all of us – regardless of our level of achievement – to be both mentor and mentored in new and different ways.

Perhaps you attended one of the Speed Mentoring programs offered in the last two years. During the course of the evening, attendees are able to ask specific career questions of eight senior level women and hear their direct advice. Did it work for everyone? Probably not. But we did get feedback from several women who let us know that they got "unstuck" and could see a path open that they hadn't thought of themselves. Since we know that any one approach will not work for all our members, we have been developing ideas for

programs that come at mentoring in a new way, through engaging and interesting sessions. One program – **Mentorship Salons** – will be for one evening only. A senior level woman will be paired with six or seven members in a very informal setting to address one topic – work/life balance, for example. Members will select from three such topics. Another program – **Dinner for Eight** – will be open to senior, executive level women. Its intent is to offer peer mentoring to women at the top of the corporate ladder who may want to add more depth to their advisors' circle. A third program – **Career Change Boot Camp** – will offer advice from three professionals in executive recruiting.

To make these programs (and others that we haven't thought of yet) a reality, we need the help of members willing to work for an hour or a month or a year with the Mentorship Committee. Everyone has something to offer others. Are you willing to recognize the mentor in you? We will be holding an organizing/idea sharing meeting in October and if you are interested in attending please e-mail Kathleen Ursin, co-chair of the committee at [ursin@comcast.net](mailto:ursin@comcast.net).

### UPCOMING EVENTS:



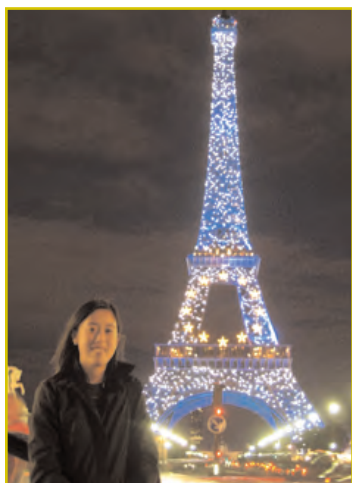
#### Industry Leadership:

#### **"A Women-Centered Perspective on Economics" presented at Mills College, Oct. 21, 5:30-7:30 pm**

Come hear Professor Siobhan Reilly, Associate Professor of Economics at Mills College, share her research, which takes a non-traditional approach to economics. In focusing on the allocation of resources through non-market mechanisms, Ms. Reilly has studied a variety of topics that touch on the economic well-being of women and families. Her research has touched on child support guidelines, the effects of liberalizing divorce laws, the well-being of stepchildren, teenagers' sex partner counts, and the effects of welfare benefits on family composition. Additionally, Nancy Thornborrow, Dean of the Lorry I. Lokey Graduate School of Business, will give us a sneak peak of the new business school building.

**Register Now!**

## FWA Scholarship Winners – Where are they today? Spotlight on Sandi Lin, Graduate Student at Stanford Graduate School of Business



### **A recent recipient of the FWA scholarship, Sandi Lin**

had not one, but two summer internships after her first year of business school at Stanford. Sandi spent ten weeks in Seattle as a product manager for Amazon, where she worked in the Fulfillment by Amazon group. Working with both software engineers and marketers, Sandi helped strategize how to bring third party sellers into Amazon's shipping network.

After her internship with Amazon, Sandi flew off to Paris, France for a month-long internship with boutique investment bank, Michel Dyens & Co. She focused on the biotech sector where she did sell side advisory work. In addition to putting together client presentations, Sandi researched the medical device sector and identified potential strategic targets and buyers for Michel Dyens to approach. Sandi picked up some rudimentary French and had a great time visiting many local attractions.

Her background in civil engineering and economics at MIT gave her experience in project finance and systems planning. She landed her first job out of school with a private consulting firm doing transportation planning, which involved developing recommendations to strategically and cost-effectively manage infrastructure assets. She now plans to expand her past experience in the professional services sector by building her career directly in industry.

Having just returned from Europe, Sandi has started her second year at Stanford's GSB, where the quarter system keeps her quite busy. This term, she's taking classes in business process design, interpersonal dynamics, and sales force management. In her spare time, she keeps in touch with Betty Linvill, her FWA mentor, a Senior VP at Bridge Bank, whose advice includes positioning yourself to take advantage of career opportunities as they arise.

### **Career Networking Event— Le Meridian Hotel, Oct. 29, 6-8 pm**

The FWA Corporate Sponsorship Committee presents the Second Annual Career Networking event where FWA Sponsors and members will enjoy hors d'oeuvres and a no host bar and hear former FWA president, Michelle Alberda, talk about her new book ***Skirtworking®: Sharing Knowledge Information and Resources Together***. This is a great opportunity to network with representatives from premier corporate sponsors Wells Fargo, California Society of CPAs, PriceWaterhouseCoopers, and the San Francisco Business Times, among others.

Additionally, FWA members and guests will be able to mingle with members of our alliance partners from 85 Broads, American Society of Women Accountants, Chartered Financial Analysts Society, Commercial Finance Association, FEI, National Asian American Society of Accountants, and the Wharton Alumni Association. This is a not to be missed occasion to meet, interact, and learn more about each other.

## Women and Their Money

### Camilla Neri, CFP, Retirement Capital Strategies

**Camilla Neri**, a respected financial adviser, voted among the Top 25 Advisors in Silicon



*Camilla Neri*

Valley, recently distilled her 25+ year career into valuable “lessons learned” for an eager crowd of FWA members and guests. Cam focuses on helping female clients

manage their financial futures while being aware of some of the mental hurdles they must overcome. Her career was borne of compelling personal circumstances that many women face, i.e. divorce at an early age and building a successful business from scratch without mentors to guide her. She has incorporated her life experience into her practice, which explains why so many women find her counsel enlightening and motivating.

Cam laid out several “financial truths” for the group to consider when advising female clients, saying that women often:

- 1 Confuse “security” with “safety”. This leads them to make overly conservative investment decisions and erodes the long-term financial security they seek.
- 2 Prefer to “wait for Prince Charming to take care of me” when it comes to financial planning. This leads to a reluctance to begin saving and investing until an older age when it may be too late to catch up.
- 3 Lack the understanding of financial basics in the mistaken belief that it is all too complicated for them, leading them to exist in an “Alice in Wonderland” world of non-engagement. While both men and women suffer from this insufficient

financial knowledge at alarming levels, men are more confident they “know” what they’re talking about, while women are more confident they “don’t know”. This translates into a gap when it comes to confidence about money and investments and actions to be taken.

Cam extended these “truths” to the insufficient role society plays in educating people financially. Lack of basic financial education in the school system handicaps everyone, female and male, from building a sound financial foundation. 401(k) plans, the primary investment vehicle of many, often are constructed by administrators with poor financial planning skills and can leave employees exposed when they believe they are building a sound financial future.

Cam stressed the importance of acting as a coach and educator when confronted with these faulty financial mind sets. Women are good listeners and see money as a tool. If a financial planner doesn’t pre-judge her clients and really listens to understand their needs, women are often much more open to receiving the counsel that will set them on a secure financial path. Cam believes strongly that each client’s financial strategy should be personalized to their world perspective and what they want to get out of life. If they see the personal connections, it is easier for them to “stick to it” in bad, as well as good, times. She runs her practice on the belief that if you are good to your clients, they will be good to you. In addition, she underlined the importance of honoring your staff and building a strong network as ways to build your professional success.

## Networking Series— Short game golf clinic at the Burlingame Golf Center



On a breezy afternoon on Aug 13, a group of about 30 women gathered at the Burlingame Golf Center to attend a short golf clinic to learn how to execute a chip shot. This was part of the Networking Series and it was also opened to non-members of the FWA. Janet Coles, a former LPGA Tour player demonstrated the execution of the 'itty bitty' shot with the finesse of a pro. As an instructor, she was effective and motivating. The ladies were then encouraged to practice this pinch shot on the green. Most brought their own golf clubs to the clinic. However, for some of the ladies who did not own a golf club, the Center was able to provide them with one. Food and drinks at the club's cafeteria, and more opportunities to network followed the clinic. Most of us went away with a better understanding of the chip shot and for others, like yours truly, an initiation into the sport.

## Networking In the Great Outdoors – an afternoon hike at Wunderlich Park

What happens when a bunch of smart, numbers-savvy women get together in the woods to walk uphill? Great conversation, easy mingling (just speed your pace up or down), and a great workout of both body AND brain. That's what a group of fifteen or so women found at the FWA's peninsula hiking event in Woodside last August. Coordinated by Pam Flournoy with Lisa Quan as navigator par excellence (leading a herd of conversation-absorbed women through lots of turns on windy trails is no small feat), the group unanimously agreed that the event was a major success. The more casual style of "networking" afforded us conversations that lasted twenty minutes instead of five and provided ample space for good talks. And, to top it off, the views amidst the redwoods were breathtaking.



All in all, the FWA's first hike was a hit – stay tuned for more hikes in the future.

**Are you looking for a new job or interested in attracting FWA members to your organization?**

**Visit the [FWA Career Center](#) to post a job request and browse recent listings.**

## Save the Date for these upcoming fourth quarter events!

### Thursday, October 9

Becoming a Person of Influence  
San Francisco, 5:30-7:30 pm

### Thursday, October 16

When You're Haute, You're Hot  
San Francisco, 5:30-8:00 pm

### Tuesday, October 21

A Women-Centered Perspective on Economics  
Oakland, 5:30-7:30 pm

### Thursday, October 23

Life in Bear Market  
Silicon Valley, 6:00-8:30 pm

### Tuesday, October 28

Industry Leadership Program featuring  
Karen G. Johnson-McKewan  
San Francisco, 11:30-1:30 pm

### Wednesday, October 29

Career Networking Event  
San Francisco, 6:00-8:00 pm

### Wednesday, November 12

Speed Mentoring  
San Francisco, 5:30-8:00 pm

### Thursday, November 13

LinkedIn Lunch and Learn  
San Francisco, 12:00-1:00 pm

### Monday, November 17

Lunch with Ken Rosen, Economist  
San Francisco, 11:30-1:30 pm

### Tuesday, November 18

New Member Mixer  
San Francisco, 5:30-7:30 pm

**[Register Now!](#)**

## Welcome New FWA Members!

### The FWA would like to welcome the following new members!

**Banu Alkaya**, PG&E  
**Christina Bartning**, The PMI Group  
**Erin Beadle**, Morgan Stanley  
**Jessica Berg**  
**Elizabeth Brindle**, Wells Fargo Funds Mgt  
**Tiffani Brownley**  
**Karen Chan**, PG&E  
**Mary Ellen Clifford**, Intel Corp  
**Carla Cooper**, Baird Investment Management  
**Amy Coty**  
**Denise Cushway**, Wells Fargo Bank  
**Debra Ann Early**, Wells Fargo Funds Mgt  
**Sonia Gioseffi**, Morgan Lewis & Bockius LLP  
**Susan Graham**, Ernst & Young  
**Fiona Grandi**, KPMG LLP  
**Melissa Griffiths**, BDO Seidman  
**Deborah Kaminski**, Burr Pilger & Mayer  
**Nancy Kazdan**, Market Share International  
**Lisa Klinkefus**, Bank of the West  
**Alison Mei Ling Lim**  
**Jennifer Lin**, PricewaterhouseCoopers  
**Holly Long**, EPIC  
**Jennifer Man**, Atlantic Trust  
**Laraine McKinnon**, Barclays Global Investors  
**Jennifer Napper**, Smith Barney  
**Laura Patnode**, Wells Fargo  
**Alexandra Redwine**, O'Melveny & Myers LLP  
**Maureen Reilly**, JPMorgan  
**Pat Scatena**, Scatena Legal  
**Jennifer Schatz**, Matthews Intern. Capital Mgt.  
**Megan Schoettmer**, Bridge Bank  
**Lindsey Splendone**, Wachovia Securities  
**Katherine Taormino**, SVB Financial Group  
**Lois Towers**, The McHenry Group  
**Jin Wang**, Deloitte & Touche  
**Kim Watson**, Deloitte & Touche  
**Liyuan Woo**, Deloitte & Touche  
**Qian (Amy) Zhang**, Harb Levy & Weiland

## FWA Membership Announcement Regarding Membership Categories and Dues for 2009

The FWA Board recently decided to simplify and consolidate the seven membership categories into two categories, Active and Affiliate Members. This will:

- Encourage membership by making it clear that anyone can join
- Eliminate inconsistencies for students and recent grads, which discouraged membership
- Simplify our administration of the membership processes (i.e. new member applications, renewals etc.)

To further simplify operations for our volunteer-run organization, the Board has also decided to charge one annual membership rate of \$195. This is the same rate Active Members have paid the last few years. About 10% of our dues-paying membership will experience an increase. The new rate will be effective for the membership year beginning January 1, 2009.

None of the recent changes affect the rights or benefits of any member class as specified in our Bylaws. According to our Bylaws, FWA has a Voting Member class, also called Active Members. There are also numerous Non-Voting Member classes (Associate, Sustaining, Long Distance, etc). The Non-Voting Member classes will now collectively be called Affiliate Members.

Affiliate Members enjoy most membership benefits, however, the Bylaws specify that only Active Members are allowed to vote or hold an Association Board seat. To learn more about the membership requirements for each category, please visit the FWA website at: <http://www.fwasf.org/membership.asp>.

If you have any questions, please contact one of our Membership Co-Chairs:

**Leanne Karns**, [leannekarns@hotmail.com](mailto:leannekarns@hotmail.com)

**Anne Chambers**, [achambers1@comcast.net](mailto:achambers1@comcast.net)

**Lisa Pfeil**, [lpfeil@triu.com](mailto:lpfeil@triu.com)

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**Changed jobs recently? Be sure to update your profile at [www.fwasf.org](http://www.fwasf.org)**

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**Interested in networking with other FWA members?**

**Check out our group on [LinkedIn!](#)**

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**Members on the Move**

**Patty Nykodym:**  
joined FF&L as CFO

**Fiona Grandi:**  
promoted to  
Partner at KPMG

**Natasha Hunerlach:**  
promoted to Manager  
at Deloitte